

# Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

## OPERATIONAL DIRECTIVE

**FRWDB OD # 29-18, Revision D**

**Date Released: July 12, 2022**

**To: All Fresno Regional Workforce Development Board Providers of Services**

**From: Blake Konczal, Executive Director**

**Effective Date: July 12, 2022**

**Subject: Participant Contact**

**Applicable Program: All**

**Revision History: Initial Release – 9/13/18; Rev B – 6/29/21; Rev C 1/27/22**

This Revision D provides clarification as to when to open the appropriate service codes.

This OD references OD 10-21, Closure, Exit and Follow-up Process.

Providers of Services staff must have documented contact with participants no less than once every 30 days.

Contact is defined as a dialogue (2-way conversation) with the participant, using the methods below:

- Verbal – in-person, telephonic, or video conference
- Written – email, US Mail, text message, or CalJOBS<sup>SM</sup> internal message

Each contact (or attempted contact) must be documented in the case notes in CalJOBS<sup>SM</sup> within 3 business days of the event.

### Lost Contact/Can Not Locate

If contact has been lost, every effort is to be made to re-establish contact with the participant and resume participation in the program. In the event staff is unable to make at least one contact, as defined above, with a participant for more than 30-days, staff must initiate the no contact process and continue to attempt to contact the participant at least once each month for a minimum of 60-days.

Provider staff will open the last CalJOBS<sup>SM</sup> 200 service code for Adult/Dislocated Workers and 435 for youth to initiate the "no contact process" and case note each of the attempts to contact the participant during this 60-day period. Provider Staff shall not open any additional CalJOBS<sup>SM</sup> service codes during this period unless contact is re-established and services are provided.

If contact is re-established within 60 days from last date of documented contact, provider staff must document the reason for the participant's failure to maintain contact. If the participant is not able to provide a valid reason for not staying in touch with the provider staff, the participant will soft exit within 90 days from the date the last 200 service code was entered in CalJOBS<sup>SM</sup>.

If the Provider deems that the reason for lack of contact is valid and are able to establish direct contact with the participant, provider staff may continue to provide services and must open an appropriate service code prior to 90 days of the last 200 service code.

If contact has not been re-established within 60 days from date of documented service, the appropriate Notice of Intent to Exit letter must be completed (form # ADW-001 or YTH-008) and mailed to the participant's last known mailing address by certified mail with a return receipt requested. A copy of the letter, the certified mail receipt, and the return mail receipt, if applicable, must be uploaded to the digital case file in CalJOBS<sup>sm</sup> and documented in case notes.

If a participant is co-enrolled with a partner or other WIOA program, the appropriate staff of that partner shall be notified that the mutual participant is not complying with WIOA requirements.

- If the participant fails to respond within fourteen (14) calendar days of the letter, **they will be soft exited in CalJOBS.**

If the letter is returned by the Postal Service, the returned letter and envelope must be uploaded into the digital case file.

### **Digital Case File Naming Convention/Upload Process**

All documents/forms must be uploaded to CalJOBS in the Document (staff) section and labeled accordingly under the "Document Tags" field (Keywords that will be indexed with the attachment) in CalJOBS.

The digital case file standard as described below includes the naming convention of all documents uploaded to CalJOBS. Provider staff must use the digital case file naming convention for documents as follows:

- Utilizing the CalJOBS Case Management System in the Document (staff) section
- Upload/Scan a document
- Input Document Tag name below that is in **bolded underline text:**

#### **Participant Contact/ (Insert Document Tag Name Below):**

- Notice of Intent to Exit Letter
- Certified mail receipt
- Returned mail

If you have any questions, please contact the appropriate FRWDB Program Coordinator

### **Forms:**

- ADW-001, Adult Notice of Intent to Exit Letter template
- YTH-008, Youth Notice of Intent to Exit Letter template